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ABSTRACT

A study was conducted to determine whether alumni who were previous scholarship recipients were more likely to pledge financial assistance to their alma mater than were alumni who were not financially assisted. A total of 140 alumni were to be contacted through a regular phonathon, with a special script for the 70 previous scholarship recipients. None of the study group had ever made donations to the college. The script for the previous scholarship recipients included a statement acknowledging the name of the scholarship they received and the importance of scholarships to students. Of the 70 previous recipients, 60 were actually contacted, and 51 pledged a financial gift, while 9 made no commitment of a gift. Sixty-six contacts were made from the 70 alumni who had not been undergraduate scholarship recipients. Of these 66, 16 pledged a gift, and 50 made no pledge. The alumni who received scholarships pledged financial gifts at a significantly higher rate than the nonrecipients. It is concluded that institutions with large numbers of alumni may wish to direct their phonathons to previous scholarship recipients. (SW)

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TARGARETING YOUR PHONATHONS TO ALUMNI

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ABSTRACT

The research question proposed was that alumni who were previous scholarship recipients were more likely to pledge financial assistance to there alma mater that alumni who were not previous scholarship recipients. Two groups of 70 alumni were used to test the hypothesis. The subjects were contacted in a regular phonathon with a special script for the previous scholarship recipients. The research hypothesis was confirmed. Alumni who had recieved scholarships as undergraduate students pledged finciancial gifts at a significantly higher rate. The findings support recent research literature and will allow institutions with large alumni groups to target their phonathons with greater efficiency.

Key descriptors: Fundraising, phonathon and alumni.

TARGARETING YOUR PHONATHONS TO ALUMNI

Most institutions of higher education telephone alumni for financial support as a part of their annual giving program. This process, usually called phonathon, is generally expected as an effective fund raising technique (Cover 1980; Ashton & Peabody 1981).

For help with phonathons there are two sets of materials available as follows:

1. A Guide to Successful Phonathons, 1980. Published by the Council for Advancement and Support of Education.

2. Phonathon System Kit, 1982. Published by the Fund Raising Institute.

Both of these sources contain information to allow an institution to begin an annual phonathon.

There are articles that help to further refine the phonathon technique such as the one written by Mary Moss (1982), titled "Dialing For Duke". However, after a literature review covering ERIC, SSCI and Dissertation Abstracts data bases there were no references that suggested

research findings for targeting or stratifing the phonathon.

After working with phonathons for five years with an alumni population in excess of 38,000 there was a need to know how to be more selective in finding those alumni to be contacted because of sheer numbers.

PROBLEM The problem specifically was to find characteristics or predictors of likely givers and to increase the annual giving.

Several dissertations have been completed with interest in identifying alumni characteristics for givers in general and a dissertation completed by Karl Beeler in December, 1982 did include a research question that proved to be significant in classifying those alumni who were donors as opposed to those alumni who were non-donors. The variable or research question delt with whether the alumnus had been the recipient of an institutional scholarship or grant. Beeler tested this question in two ways, one, as an independent variable in a univariate analysis and two, as one of 14 independent variables in a multivariant mode using discriminate analysis.

A 20% random sample of 5,000 graduates resulted in

identifying 500 donors and 500 non-donors. There was a total of 744 responses used for the analysis. Donors were defined as those graduates who made any financial contribution during 1977 through 1981.

Relating Beeler's finding in regard to those alumni who as students had been the recipient of an institutional scholarship or grant with a local practice of presenting current students their scholarship checks in a special ceremony designed for the purpose of creating a sense of expectency within each recipient that when he/she becomes an alum that they will want to help those students who will follow them, led to a question that could be researched. The idea could be that in targeting or stratifing the phonathon to those alumni who are non-donors and that who were past recipients of an institutional scholarship would be more apt to pledge a gift over the telephone than the typical non-donor who had not received an institutional scholarship.

The research hypothesis is that those non-donors who were past scholarship recipients would pledge a gift in a significantly greater frequency than the typical non-donor.

SUBJECTS To test this hypothesis 70 alumni were selected who had never made a financial contribution but had been recipients of an institutional scholarship as an

undergraduate student along with 70 alumni who also had no record of a financial gift to the institution, but who had not previously been awarded a scholarship were selected as subjects. The 70 previous scholarship recipients could not be chosen randomly, however, the 70 non-donors who were not previous scholarship recipients were selected with a computerized random number procedure available locally.

METHOD During a normally scheduled phonathon for the institution using volunteer student callers the 140 previously identified subjects were contacted. Ten days prior to the actual phonathon the 140 subjects were sent a postcard explaining that they would be receiving a telephone call from students on campus. This card is regularly used prior to the actual phonathon and was not created new for this study.

The script used for the 70 non-donors who were not previously scholarship recipients was the normal script used for all phonathons for the past year. The script for the 70 non-donors who were previous recipients of a scholarship was modified to include the following statement:

> Our records indicate that in "date" you were a recipient of the "name of scholarship" and we know you understand how important scholarships are to students.

In addition to the modification of the script it was determined that only two students would be trained to call the alumni. One student made all the calls to one group. These two students, both girls, had not made any previous telephone calls of this nature. They called along with 20 other students over a period of three weeks. It took far longer than was first expected to actually make contact with the specific alumni. It should be noted that it took the alumni office about six months to establish the addresses and telephone numbers of the subjects and even at that the callers discovered they had 21 incorrect numbers.

RESULTS Of the 70 alumni who had been the recipients of a scholarship only 60 could actually be contacted. Out of the 60 contacted 51 pledged a financial gift and 9 made no commitment of a gift. This represents an 85 percent response to the request for financial support.

There were 66 contacts made from those 70 amumni who had not been scholarship recipients as undergraduates. There were 16 who pledged a gift or approximately 24 percent, and 50 would not make a financial pledge.

These data, being nominal, were analyzed against a chance probability of no difference between the 2 chosen groups by a chi square technique. The chi square value is 46.595 with one degree of freedom. The null statistical hypothesis of no differnce, at the .95 level of confidence

is rejected. It was concluded that those alumni who had been awarded scholarships as undergraduate students were singificantly more likely to pledge financial support than alumni who had not received any scholarships as students.

DISCUSSION These findings agree with Beeler's work and strengthen the arguement for stratifying one's energies toward those alumni who were benafactors of financial assistance as students. Reporting from a nationwide survey of public attitudes toward higher education Lindenman (1983), reports that 23.4 percent reported that they made donations to their undergraduate school to "repaying financial assistance received while I was a student there".

Institutions with large numbers of alumni who need to market their efforts for the maximum results should consider ways to direct their phonathons to previous scholarship recipients.

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